

HR Administrator Dashboard for SharePoint 2007 Solution Setup

Setup

A basic knowledge of how to administer SharePoint and how to set up CorasWorks web parts will be helpful in making the changes specified below. If more instruction is needed, refer to the CorasWorks Capabilities Guide.

Task	Description
Create Site	Create the site from the CorasWSC.HRAdministratorDashboard.v9.0.2 template.
Set up Directory List	<p>The CorasWorks Active Display web parts used in the HR Administrator Dashboard pull data from Vacation Approval, Training Approval, and Performance Review solutions anywhere in the organization. For this to work, you must tell the Dashboard the URLs of these other solution sites.</p> <ul style="list-style-type: none">• Using the left-side navigation, open the list named HR Directory List• Enter a record in the list for each Vacation Approval, Training Approval, and Performance Review solution site to be included in the Dashboard.<ul style="list-style-type: none">○ For the Title column, enter the name of the site to include○ For the Site URL, enter the URL of the site (do not include a page name, such as 'default.aspx'.)○ For Category, leave 'Active' selected. If you change an entry to 'Not Current' it will not be included in any Active Displays in the site.○ Leave List Name blank.○ Continue adding new items until you have entered all the site URLs to include
Set up Shared Calendar	<p>On the home page, configure the Shared Calendar web part to display information from various calendars.</p> <ul style="list-style-type: none">• Open the Home (default) page• From the Shared Calendar web part menu, select Actions Show Admin• On the Sites & Lists tab, enter the URL of the current site and click Add URL. (This will ensure the "Company Calendar" built into the solution is included.)• Next, enter the URLs of all Vacation Approval and Training Approval sites set up in your organization. After each, click Add URL.• Click OK to exit the web part Admin screens.

Security Setup

Task	Description
Security Check	Make sure the HR administrator has Read access to all the sites providing the

	data (sites named in the HR Directory List)
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Shared Calendar

The home page of this Dashboard solution contains a Shared Calendar web part. To roll up additional lists to the web part, you may wish to know the CorasWorks Schema details for this web part.

- Web Part Name: Shared Calendar
- Schema Name: LEvent ShCal DisptitleStartEndType
- Column Mappings: Here are the “field mappings” that tell the calendar what field to use for the text to display, and what date fields are represented by the calendar:

Field Name Mapping	
Begin*	Start Time
End*	End Time
Title*	DisplayTitle
Recurrence	Recurrence
Recurrence Data	RecurrenceData
Master Series Item ID	MasterSeriesItemID

In addition, the “Time Type” column is available for search, filtering, and grouping.

The “DisplayTitle” column is a calculated field that displays different things depending on the solution it came from:

- In the HR Administrator Dashboard’s Company Calendar list, it displays the Title.
- In the Vacation Approval solution, it is a concatenation of the PersonText and Title columns.
- In the Training Approval solution, it is a concatenation of the PersonText and Class Title columns